DOCUMENT RESUME

ED 035 107 | 24 | EA 002 775

AUTHOR	Cook, Desmond L.
TITLE	Management Training Program for Educational Research Leaders. Final Report.
INSTITUTION	Ohio State Univ., Columbus. Educational Program Management Center.
SPONS AGENCY	Office of Education (DHEW), Washington, D.C. Bureau of Research.
BUREAU NO	BR-8-0167
PUB DATE	31 Mar 69
GRANT	OEG-0-8-000167-1923(010)
NOTE	73p.
EDRS PRICE	EDRS Price MF-$0.50 HC-$3.75
DESCRIPTORS	*Administrative Personnel, Educational Research, *Educational Researchers, Information Dissemination, *Management Education, *Research Methodology, *Research Utilization
IDENTIFIERS	ESEA of 1965

ABSTRACT

To increase the expertise of leaders in educational research, a series of four 5-day training sessions were held between April 1968 and January 1969. Ninety-five persons from all parts of the nation attended the sessions, including directors of educational research and development programs, professors, administrators, and research associates. The training sessions sought to provide participants with a background in selected management concepts and principles. The participants are expected to implement the concepts and principles through specific programs, to instruct others in the techniques, and to disseminate information about the research management process to educational administrators. Content areas of the program included the management concepts of planning and controlling, network analysis, the systems approach, work-flow techniques, problem analysis, and decision-making procedures. The report includes participant evaluations. Bibliographic material and a list of all participants are appended. [Forms on pages A-2 and A-3 may reproduce poorly due to small print.] (JK)

ED035107

BR 80167
BA 24
OE/BR

FINAL REPORT

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MANAGEMENT TRAINING PROGRAM FOR EDUCATIONAL RESEARCH LEADERS

March 31, 1969

U. S. DEPARTMENT OF
HEALTH, EDUCATION, AND WELFARE

Office of Education
Bureau of Research

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MANAGEMENT TRAINING PROGRAM FOR EDUCATIONAL RESEARCH LEADERS

Grant No. OEG-0-8-000167-1923 (010)

Desmond L. Cook

October 1, 1967 to March 31, 1969

The training program reported herein was conducted pursuant to a grant from the Office of Education, U. S. Department of Health, Education, and Welfare. Grantees undertaking such projects under Government sponsorship are encouraged to express freely their professional judgement on the conduct of the program. Points of view or opinions expressed do not, therefore, necessarily represent official Office of Education position or policy.

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Acknowledgement

The training program described herein, while the responsibility of one person, could not have been carried to a successful completion without the assistance of many other persons and agencies.

The program director would like to take this means of expressing appreciation to those persons who worked directly in the instructional phase of the project and to those persons providing invaluable support work. Special thanks are given to Duane Dillman, William Loeber, Jo Goehl and Steven Gyuro for their contributions to the instructional program. Appreciation is also expressed to Jeff Gore for the preparation of a series of excellent visuals and assisting in the preparation of handout materials. Tom Schied and John Church assisted in the preparation of selected sections of the final report. Not all of these persons were paid directly from project funds, but their contribution represents commitments from the Educational Program Management Center to the training program.

The contributions of Mrs. Penny King, Mrs. Lynn Rosenberg, and Miss Sue Metzmaier in preparing materials, processing applications, and the handling of the myraid details of such a project reflects dedication to the total effort. Mrs. King was the full time secretary to the project except for one summer period. She typed the preliminary draft materials and prepared the copy for the final report.

The encouragement and support from the participants was of great value to the staff. The many suggestions for revision, incorporation of new ideas, and evaluation reports were highly beneficial to the program. A special debt is also owed to the guest speakers for taking the time to participate in the program and to prepare the papers they presented.

A sincere expression of thanks is extended to all of the above persons. The program director, however, assumes final responsibility for total program direction and the contents of the final report.

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A. Orientation of the Program

Type of Program

One of the major problems involved in bringing about educational change by means of introducing new ideas, techniques and innovations lies in the dissemination procedures employed. Consideration must be given to the content of the dissemination, the method utilized, and the target audience. The purpose of this report is to describe the activities undertaken to disseminate, by means of a training program, recent procedures for the improvement of the management competency of educational personnel charged with the administrative responsibility for various programs and projects funded under Federal legislation as represented by the Elementary and Secondary Education Act of 1965 as amended.

The report presents the substantive content and procedures carried out under the provisions of a Special Training Project grant from the Research Training Branch, Bureau of Research, U. S. Office of Education. To some degree, the Special Training Project described in this report represents a continuation of a similar type of project funded under U. S. Office of Education Grant No. OE 6-2786 titled A Training Program in the Use of Management Information Systems in Educational Research and Development Activities during the period September 1, 1966 to June 30, 1967. The present project, however, differs from the prior project in substance, method, and target audience.

Recognition was given in the present project to the assumption that an effective method of disseminating a new concept or idea is to focus upon a target audience which would be in a position to influence training programs within colleges and universities, institutions, and agencies. Efforts to up-grade the skills of professional persons in the field by attempts to reach them directly would be an almost insurmountable task. It appeared therefore a more efficient and effective effort to reach those persons who could bring about changes and/or modifications in training programs and courses which are designed for the purpose of developing professional personnel in the field of education who anticipate assuming responsibility in the area of administration and management of research and development activities. The acceptance of this target audience required an alteration of content and method from the previous project noted above. The project described in this report, while highly similar on the surface to the previous project, represents an effort in a different direction. Specific objectives

content, methodology, and target audience are described in later sections of this report.

Training Period

The support period for the present grant extended from October 1, 1967 through to March 31, 1969. During this period, four sessions each five days in length were devoted to actual instructional activity. The balance of the total funded period included activities associated with publicity, development of instructional materials, screening and selecting of participants, evaluation and review of each session plus the total program, and the preparation of the final report.

The four sessions were conducted during the time periods listed below:

April 22-26, 1968
June 24-28, 1968
September 16-20, 1968
January 6-10, 1969

The time interval between sessions was designed to give possible participants an opportunity to attend a session which would be compatible with obligations and responsibilities in their place of employment. The periods between sessions were utilized by the staff to review and evaluate various activities and to develop or modify instructional content and method in order to more nearly meet the expressed needs of participants in the program.

Size and Nature of Trainee Group

The original proposal requested funds for the support of 100 persons for the total program. Each of the training sessions was designed to have a total of 25 participants. A group size of this number was deemed desirable in order to permit relatively close interaction between the instructional staff and the participants. Further limitation on the group size for any one session was dictated by the utilization of simulation techniques as a major vehicle of instruction. The simulation activities employed are described in the section entitled "Description of the Program."

As noted above, the planned target audience for the program was those individuals having administrative leadership positions in their institutions and agencies which had a responsibility for

the conduct of federally supported large-scale research and development programs and/or who would be in a position to make a direct impact on research training in the areas of educational administration and research. It was anticipated that the total number of such leaders trained in the principles and use of management techniques would serve as a cadre for training other persons in these same techniques.

The principal criterion for an individual's participation in the training program was his present or anticipated leadership position for the planning and controlling of research and development activities within his own institutions, agency, center, or laboratory. Trainees were selected from the general categories of positions.

1. Department Heads, Deans, and Professors of Educational Research and Administration;
2. Directors of Title IV Research Training Programs;
3. Coordinators of federally funded research programs with particular responsibility for Title I and III programs;
4. Directors and Assistant Directors for Regional Educational Laboratories;
5. Directors and Associate Directors of Research and Development Centers in Education;
6. Directors and Assistant Directors of Centers for Vocational and Technical Education;
7. Directors and Assistant Directors of ERIC Clearinghouses.

More specific criteria for participant selection included a leadership position in educational research or administration with some promise of impact to others, affiliation with an educational agency, and possession of a background in educational research and administration through training and/or experience.

A summary description of the participant group by professional position slightly modified from the position descriptions noted above is presented in Table 1. From this table, it may be observed that a total of 95 persons attended the four sessions. The largest group was from the category of Directors followed by Professors, Administrators, and Research Associates in that order. The table also shows the number attending each training session. Information about the participant group relative to geological location, place of employment, degree held, and major field of study is provided

TABLE I - Distribution of Participants by Professional Position

Position \ Session	April N=17 f	%	June N=26 f	%	September N=30 f	%	January N=22 f	%	TOTAL N=95 f	%
Administrators	3	17.6	5	19.2	4	13.3	5	22.6	17	17.8
Directors	7	41.0	18	69.2	18	60.0	8	36.4	51	54.7
Professor	2	11.8	3	11.5	7	23.3	9	41.0	21	21.0
Research Associate	4	23.6			1	3.5			5	5.2
Other	1	5.9							1	1.3

Note of Professional Positions:

1. Administrators - includes Deans, Principals, Superintendents, Presidents, Vice Presidents or any assistants under these titles

2. Directors - includes Directors, Supervisors, Department Heads, Coordinators, Project Managers

3. Professors - includes Full, Associate, and Assistant Professor ranks

4. Research Associate - includes Research Assistant

in supplemental tables incorporated as part of Appendix B - Materials Relating to Participants. Information with regard to number of applications and acceptances is summarized and presented as part of the section on "Program Reports." A list of participants by name and session has been incorporated as part of Appendix A. The total number of paid participants was less than the number for which support was requested. For each session, a larger number of possible participants was reviewed and selected. Cancellations after acceptance by participants due to conflicts in schedule, priority meetings, and weather conditions resulted in the actual number of paid participants being less than the planned number. From the data presented in Table I plus the supplementary information provided in the "Program Reports" section and Appendix B, the program director is confident that the general criteria for participation were met and that the participants actually attending were representative of the planned target audience.

Program Objectives

The general objective of the program was to provide a sufficient background in selected management concepts and principles so that an individual participant would be able to implement them on programs, to instruct research and administration leaders in the same concepts and techniques, and to disseminate information about the research management process to persons in educational leadership roles. Within this general objective the following specific goals directed the activities carried out in the program:

1. To understand the nature of the management process as it relates to educational research and development,
2. to know and understand the basic concepts and principles of management systems,
3. to develop skill and proficiency in applying management systems to program/project planning and control,
4. to acquire the skill and ability to implement such techniques in a given situation,
5. to provide experience in the techniques in order that subsequent instruction and dissemination could be carried out.

In accomplishing the above general objective and specific goals, the instructional staff concentrated not only upon the acquisition of knowledge about management by the participants but also upon the development of favorable attitudes toward

management concepts and an understanding of the processes involved. While satisfactory products were desirable as a consequence of instructional activity, less emphasis was placed upon the development of such items than upon the creation of attitudes and understanding of processes.

The instructional program designed to accomplish the general objective and the specific goals is described in the succeeding section "Description of the Program."

B. Description of the Program

Major Content Areas

The major content areas of the program were developed to provide both formal instruction in and practical experience with management concepts, principles, and techniques. The structure, organization, and sequence of content were designed to provide a balance between a body of substantive knowledge and a set of experiences in an integrated fashion directed toward future participant usage. The specific objectives of the training program served as the general guide for content selection and scheduling. The substantive content followed two general themes. One theme focused upon general problems in R and D management. The second theme focused on developing specific aspects of network analysis which lead into the practical exercises and the simulation.

The specific theme was initiated with a discussion on the nature of management and management systems with a focus upon functions, processes, and systems. The fundamental management concepts of planning and controlling were introduced in this topic area and served as the unifying theme which permeated the total training program content.

The basic principles of network analysis as a management tool, with particular emphasis upon program/project definition and task structure, were then presented. The central idea of this area focused upon the systems approach. This topic lead to the area of planning which encompassed work-flow techniques. Upon completion of this area, concepts dealing with scheduling relative to time estimation and resource allocation were presented. The associated subject of cost-budgeting was discussed in relation to this topic area. All of the above preceeded the presentation of the control concept. This concept dealt with the nature of control, its operational vehicle of information systems, and management actions.

General theme presentations were presented on selected management actions. Attention was directed to problem analysis, decision-making procedures, and the forecasting of potential problem sources. Presentations were also made on the topics of research management, project management, project selection, and an overview of Planning-Programming-Budgeting System (PPBS) because of their relevance to participant responsibilities. The final major content area focused upon the organization and implementation of management systems in an educational setting. This topic involved procedures, techniques, problems, and major points of concern.

Using illustrations from actual applications and relevant situations, participants were provided with examples of the how, what and why of program management techniques as applicable to the field of education. The chief consideration of all content areas centered upon the decision-making activity relative to the allocation of scarce resources in terms of time, cost, and performance levels necessary to achieve program or project goals.

Topical areas included in the training sessions divided by general and specific theme are presented below:

<u>Specific</u>

A. Nature of Management
   1. Management Functions
   2. Management Process
   3. Management Cycle
   4. Management Information Systems

B. Project Definition
   1. Systems theory
   2. System analysis
   3. Workbreakdown structure

C. Project Planning
   1. Planning principles
   2. Work flow planning
   3. History of networks
   4. Network construction
   5. Activities and events

<u>General</u>

A. Project Management
   1. Need for Project Management
   2. Project Management Effectiveness

B. R and D Management
   1. Need for R and D Management
   2. Approaches

C. Project Selection
   1. Process
   2. Criteria for Selection

D. Planning-Programming-Budgeting System
   1. Purpose
   2. Characteristics
   3. Educational applications

D. Time estimation/scheduling
   1. Types of estimates
   2. Scheduling
   3. Resource allocation

E. Cost-Budget Preparation

F. Control
   1. Progress Report Requirements
   2. Management actions
   3. Implementing changes

G. Organization and Implementation
   1. Instructional Aids
   2. Guidelines

E. Management Actions
   1. Problem analysis
   2. Decision analysis
   3. Potential Problem analysis

In addition to content presented through formal instructional periods, participants were provided with materials in advance of their attendance. These materials consisted of the Office of Education monograph on PERT, plus other selected papers. A composite notebook of training exercises, reference lists, and supplemental papers was provided each participant for his permanent possession. A listing of the notebook materials is provided in Appendix D - Materials Relevant to Instruction. During the training session, participants had the opportunity to make use of an extensive library of texts which were relevant to the general and specific content topics. This library was housed at the training site.

Instructional Schedule

The general instructional format was a combination of a lecture-discussion approach with an integration of practical exercises at appropriate points to develop the concepts and principles presented and to facilitate internalization of subject matter. The presentations were designed to provide knowledge relative to the major content areas.

Sufficient time and adequate opportunity was provided during each instructional period to develop a climate conducive to questions and discussion as needed to insure that the concepts and principles presented were understood and their implementation and implications visable. In addition, extensive usage of audio and visual teaching aids was incorporated in an attempt to achieve efficient and effective comprehension of subject matter.

The practical experiences were developed by the Educational Program Management Center, College of Education, The Ohio State University. These experiences included an individually-oriented programmed exercise and a group-oriented simulation exercise. The individual practical exercise focused upon the use of network techniques in a realistic problem situation. The simulation exercise concentrated upon the execution of management techniques within an hypothetical organizational structure. Within this setting the group was to develop a proposal in response to an actual RFP from the United States Office of Education. Both sets of practical exercises were designed with a simulated problem situation so as to provide participants with a reality type representation of implementing management techniques and tools as they might be employed by the participant in his environment. Staff supervision of both types of experience was considered essential and supportive to insure the development of skills and techniques with regard to aspects of managerial planning and controlling.

The specific instruction schedule was divided into two major instructional blocks: a three hour morning period and a three to four hour afternoon period. This schedule was extended for one evening period of two hours during the week of each training program for a presentation by a guest speaker. Time also was set aside in the late afternoon and evening for informal instructor-student conferences and discussions. In addition, this block of time was used by the participants for independent study. A typical instructional schedule of the program content showing topics presented each day is included as part of Appendix D - Materials Relevant to Instruction.

A portion of the first morning period was devoted to establishing an atmosphere designed to stimulate interaction between participants. Administrative details regarding payment of travel and stipend were also handled in this period. A portion of the final morning period was devoted to participant assessment and evaluation of the training program.

One evening period was devoted to a presentation by a guest speaker who was selected to present a view of management application in real educational research and development settings. These speakers represented an effort by the instructional staff to provide a supplemental reality context to the training sessions and to enable the subject matter to be as viable and meaningful as possible to the participants. The following speakers made a presentation at the session indicated:

April, 1968

Kathryn J. Ripley, Research Assistant, Northern Virginia Technical College. Her presentation was entitled: Documentation of Steps to Establish a Technical College and the Evaluation of "PERT" as a Planning Tool for Educators, Phase I. This paper is presently in the ERIC system and has the document number ED 010-020.

June, 1968

Warren G. Findley, Director, Research and Development Center in Educational Stimulation, University of Georgia. His presentation was entitled: Problems and Pitfalls in the Operation of Research and Development Programs.

September, 1968

Louis D. Higgs, Deputy Director, Research Foundation, The Ohio State University. His presentation was entitled: Program/Project Management of Sponsored Programs in a University Environment.

January, 1969

Harry J. Hartley, Head, Department of Administration and Supervision, College of Education, New York University. His presentation topic was to deal with Planning, Programming, and Budgeting System in Education.[1]

With the exception of the Hartley and Ripley papers, the remarks of Findley and Higgs were duplicated for distribution to participants and copies forwarded to the ERIC Clearinghouse on Educational Administration.

The instructional load was divided between the program director and the instructional staff in order to provide a diversity of presentors to the participants. This arrangement also allowed the instructional staff time to develop effective and complete presentations on their respective topics. This approach further enabled the program to capitalize on the expertise of staff members and provided greater exposure for participants to varied backgrounds and experiences of staff members. The director and instructional staff were present at each training program and available to participants for personal consultation.

[1] Due to extremely hazardous travel conditions because of weather Dr. Hartley was not able to attend the training program for his presentation.

No major changes were made in the program following the approval of the proposal. The staff was able during the period prior to the first training session to develop a functional schedule that permitted accomplishment of the objectives of the training program. Some modifications were made in the program during the intervals between sessions in order to provide an appropriate balance in content and experiences.

The nature of any changes that did take place took the form of reallocation of time and sequence of practical experiences, redefinition of scope of selected content topics, and fuller development of instructional aids. The rationale for program changes was based upon the stated needs and interests of the participants, the adequacy of materials, and an attempt to attain an advantageous level of interaction in the learning situation. The reallocation of time and sequencing was caused largely by the integration of the simulation exercise. It was felt that earlier participant involvement and longer periods of group activity in the simulation would be most beneficial. The changes in the definition of scope of selected content topics was initiated by participant reaction. The intent of these changes was to more nearly match the need status of the participants with the organization and structure of the content areas. The advantage of multiple sessions provided the program staff time to improve and expand the changes resulted in improved instruction, greater participant interaction, and a more meaningful exposure to management concepts, principles, and techniques.

The extent to which the instructional program as described above enabled both the program staff and participants to achieve the objectives of the program is the subject of the succeeding section on "Evaluation of the Program."

C. Evaluation of the Program

An evaluation of the special training program must take into consideration the objectives which the staff had for the participants and the extent to which it is possible to assess accomplishment of these objectives. In addition to direct assessment of the objective, indirect evaluation would include various types of immediate feedback from the participants, subjective judgements about the program's success from both participants and program staff, and some type of follow-up to determine participants' reactions after a period of time. Although no formal follow-up

evaluation was undertaken, a number of participants (approximately 10 percent) voluntarily contacted the Educational Program Management Center to relate how they were making use of the skills and concepts and/or to ask for further help in applying them.

A careful examination of the objectives listed in Section A suggests some difficulty in measuring their attainment because of their relatively long range nature. That is, the behavior would likely occur often when the session was over and not during the session. On the other hand, observation of participants could reveal their degree of accomplishment of the objective pertaining to the application of the techniques to the practical exercise and simulation problem during the course of a session as contrasted to after the session. The general pattern of evaluation focused primarily upon assessing activities that were carried out during the course of each session. Evaluations made by participants and staff are presented below.

Participant Evaluation

Specific instruments completed by participants in evaluating the program included (a) an Institute Evaluation Form (b) a Management Simulation Evaluation Form (c) an Activities-Materials Personnel Evaluation Form and (d) a Participant Daily Reaction Sheet. Copies of each of these instruments appears in Appendix C - Materials Relevant to Evaluation. A summary of the results from each instrument is presented below.

Institute Evaluation Form - To secure a measure of the participants' satisfaction with the training sessions as a complete unit and to provide a basis for comparison of the participants' reaction from session to session, a rating scale identified as the Institute Evaluation Form was utilized. This form consisted of twenty-eight statements or items covering the purpose and objectives, content, instructors, usefulness of the information provided, and similar topics. Participants responded anonymously using a Strongly Agree to Strongly Disagree continuum. Approximately one-half of the statements were presented in a positive form and one-half in a negative form. Participant responses were coded so that a Strongly Agree response to a positive statement and a Strongly Disagree response to a negative statement was given a scale value of 5. A Strongly Disagree response to a positive statement and a Strongly Agree response to a negative statement was given a value of 1.

Frequency counts, corresponding presents, and mean scale values for each item were obtained for the four individual sessions and for all training session. By allowing for the presence of both the positive and negative statements on the form through reversing

the continuum for the negative statements, a high mean scale value is interpreted as a positive or favorable expression by the participants of the topic dealt with in the statement. Mean scale values for each item by session and total group are shown in Table 2.

The pattern of the mean scale values indicates that the participants were well satisfied with the sessions. In only six statements did the composite mean of all sessions fail to reach the Agree (4) category. For these items, it would appear the participants were either more greatly diverse in their satisfaction or generally less satisfied with the topics dealt with in these statements. The six statements were concerned with the specific purpose of the session allowing for efficient work of the participant (item 3), the concurrence of the session objectives with the participant's objectives (item 5), the consideration of solutions to participant's problems (item 9), the challenging nature of the information (item 10), the instructors' knowledge of their subject (item 11), and the rigidity of the schedule (item 17). Relative to the mean scale values of the responses to the other statements, these six statements generated more less positive responses. For all items, however, the mean scale value of the items were above 3.63 supporting the conclusion that the combined reaction of the participants from all sessions was positive.

By comparing the mean scale values for each session, it is seen that there was no great fluctuation among them for each statement from session to session. In only five cases did the means vary more than one-half of a point. For item i (the purpose of the institute was clear to me), the means fluctuated from 4.1 to 4.7. For statement 3 (specific purposes made it easy to work efficiently), there was a vast improvement between the first and second sessions and that improvement held throughout the remaining sessions. The mean scale values for statement 11 (the instructors' really knew their subject) decreased slightly during the middle session but that problem was solved for the final session. The mean scale value for statement 22 (the institute met my expectations) also increased with time as the result of both staff reorientation of the program to deal with participant expectiations and as a consequence of the program content becoming better known to future participants. Finally, the mean scale value for statement 24 (too much time was devoted to trival matters) decreased as the sessions progressed because of the desire of the staff to explain the misconceptions of the preceding sessions before those same problems arose.

TABLE 2 - Item Scale Values for Institute Evaluation Form

Statement	SESSION April	June	Sept.	Jan.	TOTAL
1. The purpose of the Institute was clear to me	4.1	4.7	4.3	4.6	4.44
2. The objectives of this Institute were not realistic	4.0	4.5	4.1	4.0	4.15
3. Specific purposes made it easy to work efficiently	3.4	4.0	4.0	4.0	3.85
4. The participants accepted the purpose of the Institute	4.1	4.1	4.0	4.1	4.06
5. The objectives of this program were not the same as my objectives	4.0	4.1	3.7	3.7	3.86
6. I didn't learn anything new	4.8	4.8	4.6	4.6	4.72
7. The material presented was valuable to me	4.5	4.7	4.6	4.6	4.60
8. I could have learned as much by reading a book	4.3	4.0	4.2	4.2	4.17
9. Possible solutions to my problems were considered	3.6	3.7	3.6	3.6	3.64
10. The information presented was too elementary	4.2	3.9	3.0	3.7	3.92
11. The instructors really knew their subject	4.3	3.7	3.7	4.5	3.96
12. I was stimulated to think objectively about the topics presented	4.5	4.3	4.2	4.4	4.34
13. New acquaintances were made which will help in future research	3.9	4.2	4.1	3.9	4.13
14. We worked together as a group	4.1	4.1	4.2	4.0	4.09
15. We did not relate theory to practice	4.3	4.2	4.1	4.0	4.12

TABLE 2 - Item Scale Values for Institute Evaluation Form Con't.

Statement	SESSION April	June	Sept.	Jan.	TOTAL
16. The sessions followed a logical order	4.1	4.2	4.1	4.1	4.13
17. The schedule was too fixed	4.0	4.0	4.0	3.9	3.92
18. There was very little time for informal conversation	4.1	4.2	4.6	4.3	4.25
19. I did not have the opportunity to express my ideas	4.1	4.2	4.2	4.3	4.19
20. I really felt a part of this group	4.0	4.3	4.3	4.2	4.23
21. My time was well spent	4.3	4.4	4.4	4.2	4.33
22. The Institute met my expectations	3.8	4.4	4.2	4.2	4.24
23. I received no guide for further action	4.4	4.4	4.4	4.3	4.37
24. Too much time was devoted to trivial matters	4.3	4.1	3.8	3.7	4.13
25. The information presented was too advanced	4.5	4.5	4.3	4.3	4.37
26. The content presented was not applicable to the work I do	4.3	4.4	4.1	4.4	4.28
27. Institutes of this nature should be offered again in the future	4.6	4.8	4.6	4.5	4.65
28. Institutes such as this will contribute little to educational research and development	4.7	4.7	4.6	4.3	4.59

Evaluation of Simulation Materials and Useage In order to provide information and suggestions for improving the materials and the use of the simulation exercise, an evaluation form of ten open-ended questions was developed. The questions dealt with such specific concerns as the administration, organization and realism of the device, the time length of each of its sessions, and the value of role playing. General comments were also requested for proposed improvement in the simulation.

To provide a brief summary of the responses received from the participants on this evaluation form, a classification system of seven categories was devised. If the response was totally positive by such comments as "very good," "good," "well done," or some phrase which was obviously positive in nature, it was rated as positive. In similar manner, if the comment was negative in tone by such comments as "poor," "inadequate," or by phrases such as "little feedback," "not enough time," the response was rated negative. If the comment written involved both positive and negative statements, or was of an indeterminate nature such as "okay," "adequate," or "fair" it was rated as neutral, unless in the context of the participant's response, that comment was probably either positively or negatively intended. A reaction was rated as a "suggestion" if the participants made a suggestion after a comment such as "fine, but could have . . ." or "poorly done, but could have been improved by . . ." then the action was rated either as a positive-plus suggestion or negative-plus suggestion. If the item was left blank on the evaluation sheet, the rating of no-response was given.

Table 3 lists the reactions obtained on the open-end evaluation form for each session according to the above categories. Because of a change in the form itself after it was used at the first session, there is no data provided on question 10 for the April session. The following general comments can be made on the basis of the data presented in Table 3.

1. The most positive reactions were toward the realism of the simulation exercise (item 2) and the correlation of the simulation sessions with their proceding instructional sessions (item 1) and the information contained in the materials (item 4).

2. The most negative reactions were to the time length for each session (item 3), the explication of the roles to be played and the value of role playing (item 6), and the feedback from the staff (item 7).

TABLE 3 - Summary of Participant Reaction to Simulation Exercise

ITEM	RESPONSE CATEGORY						
	N	Positive & Suggestive	Positive	Neutral or Suggestive	Negative & Suggestive	Negative	No Response
1. Administration & Organization of the Game	98	5	22	45	4	11	11
2. Realism of the Game	98	7	45	27	1	7	11
3. Time length for each session of the Game	98	5	11	45	6	25	6
4. Information contained in Organization Description & Action Memorandums	98	3	21	44	4	13	13
5. Correlation with Instructional Sessions preceding Game Play	98	2	43	29	1	9	14
6. Explication of Rules to be Played - Value of Role Playing	98	12	16	29	7	26	8
7. Feedback from the staff	98	2	11	49	10	16	10
8. Clarity of End Products to come out of each Session	98	0	21	43	0	19	15
9. How can the Game be Improved?	98	1	2	63	2	4	26
10. Other or General Comments	77	4	17	12	2	4	38

3. The item which had an approximately equal positive and negative reactions referred to the clarity of the end products (item 8). It is suggested that these responses might have been different if the question were changed so that it referred to either the clarity seen before the work was undertaken or the clarity of the products achieved at the end of each session.

4. The largest number of neutral responses were obtained on the items concerning the time length of each session (item 3), the information in the materials (item 4) and the clarity of the end product (item 8).

5. The largest number of nonvalue-laden suggestions were given in response to the items asking for suggestions for improvement (item 9), as would be expected, and followed by the items referring to administration and organization (item 1) and feedback from the staff (item 7).

Such a rating of reactions for questions dealing with suggestions for improvement and other general comments has value primarily in indicating the general attitude of the participants toward the simulation and the specific areas in which the simulation must be improved. The responses do, however, provide some information which is useful in deriving an overall assessment of the total program.

Activities, Materials, and Personnel Evaluation Form An attempt was made to obtain the participants' evaluation of the activities, the materials, and the personnel with whom they had contact during the session. Each member of the staff was listed on an evaluation form under which was given the materials and the activities dealt with by that instructor. The participants were asked to apply a four-point scale to each topic (1=Poor, 2=Fair, 3=Good, 4=Excellent) as well as to describe the strengths and weaknesses of each presentation. The evaluation form is shown in Appendix C - Materials Relevant to Evaluation.

Unfortunately the participants failed to give any constructive criticisms on their evaluations, choosing only to rate the instructors on each topic. Whether this was done because of the failure of each participant to read the instructions closely or because not enough time was allotted to allow the participants to list suggestions is not known, but this oversight forced the results to reflect only the participants' evaluation of the qualifications of the individual instructors. Therefore, the instructors with the most experience

received the highest ratings and vice versa and no specific areas could be descerned for improvement.

Participant Daily Reaction Sheet The Participant Daily Reaction Sheet shown in Appendix C - Materials Relevant to Evaluation was supplied in quantity to each participant. The main purpose of the form was to supply feedback to the staff at each session to correct any misconceptions or problems while the session was still in progress. It proved to be an effective device for that purpose. No attempt was made to quantify the use of these sheets by participants for assessment purposes.

Staff Evaluation

The foregoing evidence accumulated on participant reaction and behavior both during the training program and subsequent expression of participant appreciation and usefulness following the program indicates that the training program was highly successful. Although it was difficult to assess immediately the degree to which several of the stated objectives were met, the evidence discussed above would indicate that the specific objectives were met during the one week sessions and that the general objective is continuing to be met as a result of the training programs. Letters are available in the files which indicate that t.. management concepts and principles are being implemented by participants in the program and that these participants are also instructing both colleagues and subordinates in the use of such techniques.

Although specific criticisms or suggestions for improvement were received in relation to a number of items for content, several parts of the simulation and practical exercises, and with regard to treatment of some of the sessions, it can be stated that the overall reaction was quite positive. In many cases, suggestions for improvement at one of the training sessions were implemented in part or whole at a subsequent session.

The participants as a group seemed interested in the institute content, were attentive and reactive, and attempted to apply the concepts which were being presented. The heterogeneous background with regard to both geographical distribution and professional responsibilities seemed to be a definite advantage. The groups frequently noticed that specific parts of the country or specific professional positions had problems peculiar to their location. The participants indicated frequently that they would continue contact with others whom they had met at the training program.

No major organizational problems were encountered. Materials, presentations, and the simulation exercises were all praised for their organization and application. In a number of cases, participants were unable to make adequate travel connections and either arrived at the program late or left prior to the termination of the program. This caused lack of continuity for such participants and somewhat of a disruption at times.

The major strengths of the program centered around the trainee motivation toward and interest in the general topic, the presentation of the content by the instructional staff, and the developing simulation exercise. Many favorable comments were made by the participants relative to the use made of overhead transparencies, the collection of materials in the notebooks, and the general sequence and change of pace of the instruction.

The appraisal of the weaknesses is much harder to make. One such weakness, however, centers on the lack of time for adequate discussion and application of the techniques. A one week time period turned out to be somewhat inadequate to cover all desired topics in depth plus allow time for a good play of the simulation exercise. The staff realizes that professionals at this level could seldom get away for more than one week but feel that much more could be accomplished if a longer period of time such as two weeks could be taken.

Overall evaluation of the program was, in the opinion of the program staff, highly favorable. The objectives of the institute were partially met during the week and are continuing to be met following the program. The participants seemed to benefit from the program and from the interaction with one another and the staff.

D. Program Reports

Publicity

A reasonable premise would be that the composition of the participant group would be dependent upon the means employed to inform the educational community about the Management Training Program. The purpose of this section is to describe the various methods of publicity employed.

Publicity efforts were initiated shortly after the grant was awarded. The first publicity item developed was a brochure which outlined the purpose, topics, physical arrangements, and staff for the program sessions. An application form and schedule of dates were included as part of the brochure. A copy of the brochure is included in Appendix A - Materials Relevant to Publicity.

The brochure was distributed to all of the Research and Development Centers, Regional Educational Laboratories, and ERIC Clearinghouses during January, 1968. Since the American Educational Research Association (AERA) is the largest or organized group of educational researchers, it was considered as a prime target for publicity about the Management Training Program. Consequently, about 500 copies of the brochure were taken to the 1968 AERA Convention in Chicago. About 100 of these brochures were distributed at the Educational Research Management Procedures Presession which the EPMC conducted. The other 400 copies were placed on the registration tables during the convention at the AERA exhibit booth and at the U. S. Office of Education suite.

In further efforts to reach members of the educational community, the staff developed an information sheet which was sent in January to a number of professional journals in the field of education. This data sheet contained the same information as the brochure, including an application form. A copy has been included as part of Appendix A - Materials Relevant to Publicity. Some journals printed the data sheet in its entirely while others abstracted it before printing. A list of the journals carrying notice of the program has been included as part of Appendix A - Materials Relevant to Publicity.

The assistance of The Ohio State University News Bureau was enlisted to write an appropriate news release on the program. This news release was sent in January to newspapers around the country for possible publication. This news release contained the same particulars on the program as did the brochure and data sheet. In addition, it supplied some background information on the funding problems for research and development programs. A copy of the news release is included in Appendix A - Materials Relevant to Publicity.

Publicity for the program was not all done in advance of the first session. Announcements about the presentation by each guest lecturer were distributed to faculty members of the College of Education and to other interested persons at The Ohio State University. These announcements were distributed several

weeks prior to each guest lecturer. The general public, as well as program participants were invited to the guest lectures. Copies of these announcements are included in Appendix A - Materials Relevant to Publicity.

An article on the work of the EPMC by Duane Dillman, published in the International Newsletter: Educational Evaluation and Research, (April, 1968) was also a source of publicity during the period when the program was being conducted.

The above formal methods of publicizing the program were supplemented by informal methods. The project staff called attention to the program at the time of various consultations and speeches during the year. Further, participants at each of the first three sessions were requested to distribute brochures to persons in their own and other agencies who might be interested in attending a subsequent session.

No direct evaluation of the effectiveness of the publicity effort was made. An indirect assessment could be made using the number of inquiries made about the program as well as the total number of applications received. Many of the inquiries were the direct result of an announcement of the program in the several newsletters noted above.

Application Summary

1.	Approximate number of inquiries from perspective trainees	350
2.	Number of completed applications revised	281
3.	Number of first rank applications	268
4.	Number of applicants offered admission	116

Trainee Summary

1.	Number of trainees initially accepted in the program	116
2.	Number of trainees enrolled in the program	95

3.	Number of trainees who completed the program	95

(Note: In addition to the 95 participants paid from grant funds, 12 participants attended on a non-paid basis. Of the 12 participants, nine were from The Ohio State University, one from the U. S. Air Force, and two from the U. S. Office of Education. These 12 participants are not indicated as part of the totals provided in this report.)

Categorization of Trainees

1.	Number of persons who were primarily elementary or secondary public school teachers	0
2.	Number of Trainees who were local public school administrators or supervisors	7
3.	Number of Trainees from State Education	6
4.	Number of Trainees from Regional Educational Laboratories	1
5.	Number of Trainees from Colleges or Universities	
	Four-year Institute/Public and Private	70
	ERIC Clearinghouses	3
	Junior College	1
6.	Other administrative positions	7
		95

Program Directors Attendance

1.	Total number of instructional days	20
2.	Percent of days director was present	100

Financial Summary

a. Trainee Support		
1. Stipends	7,500.00	7,200.00
2. Travel	10,000.00	10,740.00
Trainee Costs	10,500.00	17,940.00
b. Direct Costs		
1. Personnel	11,464.00	11,908.78
2. Supplies	1,510.00	1,168.22
3. Rental	100.00	38.92
4. Travel	1,000.00	731.39
5. Communication	300.00	174.87
Direct Costs	31,874.00	31,962.18
c. Indirect Costs (@ 8% of Direct Costs)		
Indirect Costs	2,550.00	2,556.97
TOTAL	34,424.00	34,519.15

Appendix A - Materials Relevant to Publicity

1. Brochure

2. Information sheet for Journals and Newsletters

3. List of Journals

4. News release

5. Guest speaker announcements

Provide answers to the following three items on a separate sheet:

- Briefly describe your present or anticipated administrative responsibility for research and development programs or projects.
- Briefly describe your training and experience in educational research.
- Outline specifically any previous or current training and/or experience in research management. (Include any previous or current experience with management information systems such as PERT, CPM, or network analysis.)

Indicate first three choices of attendance dates:

__ April 22-26, 1968
__ June 24-28, 1968
__ September 16-20, 1968
__ January 6-10, 1969

For further information please contact or mail applications to:

Dr. Desmond L. Cook, Director
Educational Research Management Center
College of Education
The Ohio State University
Columbus, Ohio 43210
Phone (614) 293-4934

A-2

Educational Research Management Center
The Ohio State University
College of Education
1945 North High Street
Columbus, Ohio 43210

Non-Profit Org. • U.S. Postage
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Columbus, O. • Permit No. 711

MANAGEMENT TRAINING PROGRAM FOR EDUCATIONAL RESEARCH LEADERS

Sponsored by

Educational Research Management Center
College of Education
The Ohio State University

Research Training Branch
Bureau of Research
U.S. Office of Education

Purpose

This training program is to provide general concepts of research management along with selected management information systems to persons in educational leadership roles. Upon completion, the participants should be able to begin implementation of these systems on research projects, to instruct research and research training leaders in the basic concepts, and to disseminate information about the research management process.

Topics

Research Management
Management Information Systems
Program/Project Management
Program/Project Planning and Scheduling
Resource Allocation and Budget Preparation
Management Reports
Project Control
Decision Making

Selection of Participants

The principal criterion for selection is present or anticipated leadership position for the planning and controlling of research and development activities within the participant's own institution, agency, center, or laboratory. Preferences will be given to deans of educational colleges; department heads; professors of educational research and administration; directors of ESEA Research Training Programs; coordinators of federally supported research programs in education; and directors of Regional Educational Laboratories, Research and Development Centers, Research Coordinating Units in vocational and technical education, and ERIC Clearinghouses. Other applications will be considered if vacancies are available.

In order to permit close instructor-participant interaction, each session will be limited to an enrollment of approximately twenty-five persons. Such a limitation will enable the instructors to provide opportunity for participants to discuss current problems and to effectively engage in the game and simulation activities under development at the ERMC.

Notification of acceptance and placement in a specific session will be sent to each prospective participant approximately one month before the session. If the preferred date of attendance is to be honored, applications must be received six weeks in advance.

Travel Allowance and Stipend

Each participant attending a full five-day institute will receive a travel allowance for one round trip between place of residence and the training institution.

The stipend for each participant is $75 per week. A dependency allowance is not available.

Training Staff

Since March 1964, Dr. Desmond L. Cook has been studying the applicability of management information systems, specifically to educational research and development. After two and one-half years of work and two grants from the Bureau of Research in the U. S. Office of Education, the Educational Research Management Center (ERMC) was established at The Ohio State University during the Fall of 1966. The staff for the present training sessions includes Dr. Cook, the Director of ERMC; Duane H. Dillman, Administrative Assistant who recently returned from a year as an U. S. Office of Education Fellow; and an instructional assistant. Materials for the sessions have been undergoing development by several staff members and affiliate persons of the Educational Research Management Center.

When and Where

The sessions will be held near the University campus on the dates indicated below:

APPLICATION DEADLINE	SESSION DATES
March 11, 1968	April 22-26, 1968
May 13, 1968	June 24-28, 1968
August 5, 1968	September 16-20, 1968
November 25, 1968	January 6-10, 1969

APPLICATION FORM

Mr.
Mrs.
Miss_____
First Middle Last

Address_____
Number Street

_____
City State Zip Code

Birth Date_____
Month Day Year

U.S. Citizen: ☐ Yes ☐ No.

If "no," has applicant been admitted to the U.S. for permanent residence? ☐ Yes ☐ No

Education

Check and complete for highest level achieved.
☐ Bachelor's ☐ Master's ☐ Doctorate

Institution_____

_____
Address

_____
Dates Attended (from - to)

_____
Major Field of Study Degree and Year

Current Employment

Employer_____
Name

_____
Address

_____
Position or Title

_____
Employed There Since When?

Telephone_____
Area Code. Number

(Please complete other side)

2. Information Sheet for Journals and Newsletters

MANAGEMENT TRAINING PROGRAM FOR EDUCATIONAL RESEARCH LEADERS

Sponsored By

Educational Program Management Center
College of Education
The Ohio State University
Columbus, Ohio 43210

Research Training Branch
Bureau of Research
U. S. Office of Education

Purpose

The purpose of the training program is to provide general concepts of research management along with selected management information systems to persons in educational leadership roles. Upon completion, the participants should be able to begin implementation of these systems on research projects, to instruct research and research training leaders in the basic concepts, and to disseminate information about the research management process.

Topics

Research Management
Management Systems
Program/Project Management
Program/Project Planning and Scheduling
Resource Allocation and Budget Preparation
Management Reports
Decision Making
Project Control

Selection of Participants

The principal criterion for selection is present or anticipated leadership position for the planning and controlling of research and development activities within the participant's own institution, agency, center, or laboratory. Preferences

will be given to deans of educational colleges; department heads; professors of educational research and administration; directors of ESEA Research Training Programs; coordinators of federally supported research programs in education; and directors and assistant directors of Regional Educational Laboratories, Research and Development Centers, Research Coordinating Units in vocational and technical education, and ERIC Clearinghouses. Applications from other research-related personnel will be considered if vacancies are available.

In order to permit close instructor-participant interaction, each session will be limited to an enrollment of approximately twenty-five persons. Such a limitation will enable the instructors to provide an opportunity for the participants to discuss current professional problems and to effectively engage in the game and simulation activities under development at the EPMC.

Notification of acceptance and placement in a specific session will be sent to each prospective participant approximately one month before the session. If the preferred date of attendance is to be honored, applications must be received six weeks prior to the beginning of the session.

Travel Allowance

Each participant attending a full five day institute will receive a travel allowance for one round trip between place of residence and the training institution, the distance to be computed from standard mileage charts.

The stipend for each participant is $75.00 per week. A dependency allowance is not available.

Training Staff

Since March, 1964, Dr. Desmond L. Cook has been studying the applicability of management information systems to the general field of education and specifically to educational research and development activities. After two and one-half years of work and two grants from the Bureau of Research in the U. S. Office of Education, the Educational Program Management Center (EPMC) was established at The Ohio State University during the fall of 1966. The staff for the present training

sessions include Dr. Cook, Director of EPMC, Duane H. Dillman, Administrative Assistant who recently returned from a year as an U. S. Office of Education Fellow, and an instructional assistant. Materials for the sessions have been undergoing development by the above staff plus several other staff members and affiliate persons of the Educational Program Management Center.

When and Where

The sessions will be held near The Ohio State University campus on the dates indicated below:

Application Deadline	Session Dates
March 11, 1968	April 22-26, 1968
May 13, 1968	June 24-28, 1968
August 5, 1968	September 16-20, 1968
November 25, 1968	January 6-10, 1969

For further information please contact or mail applications to:

Dr. Desmond L. Cook, Director
Educational Program Management Center
College of Education
The Ohio State University
Columbus, Ohio 43210
Phone (614) 293-4934

APPLICATION FORM

1. NAME (first, middle, last): ( ) Mr. ( ) Mrs. ( ) Miss

2. BIRTH DATE (month, day, year):

3. U. S. Citizen: ( ) Yes ( ) No (If "no" has applicant been admitted to U. S. for permanent residence: ( ) Yes ( ) No

4. EDUCATION:

Name & Address of Institution	Dates Attended (from - to)	Major Field of Study	Degree and Year

5. CURRENT EMPLOYMENT:

Name and Address of Employer	Postion or Title	Dates of Employment (from - to)

BUSINESS TELEPHONE (area code, number):

PROVIDE ANSWERS TO THE FOLLOWING THREE ITEMS ON A SEPARATE SHEET

6. Briefly describe your present or anticipated administrative responsibility for research and development programs or projects.

7. Briefly describe your training and experience in educational research.

8. Outline specifically any previous or current training and/or experience in research management. (Include any previous or current experience with management information systems such as PERT, CPM, or network analysis.).

9. Indicate first three choices of attendance dates:

April 22-26, 1968 ( ) September 16-20, 1968 ( )

June 24-28, 1968 ( ) January 6-10, 1969 ( )

For further information please contact or mail applications to:

Dr. Desmond L. Cook, Director
Educational Program Management Center
College of Education
The Ohio State University
Columbus, Ohio 43210
Phone (614) 293-4934

3. List of Journals and Newsletters

Monitor, Association of Educational Data Systems

Educational Researcher, American Educational Research Association

Bulletin, The Institute of Management Sciences

Newsletter, National Council on Measurements in Education

NSPER News and Notes, Phi Delta Kappa

Phi Delta Kappan, Phi Delta Kappa

The School Administrator, American Association of School Administrators

American Psychologist, American Psychological Association

Association for Supervision and Curriculum Development

4. News Release

COLUMBUS, O., Jan.---Only about one out of every 20 educational research projects submitted to federal agencies for funding apparently is approved, and an Ohio State University educator has just been given funds to undertake a program aimed at improving management techniques and thereby increasing that ratio.

The university's Educational Program Management Center under the direction of Dr. Desmond L. Cook, a professor of education, this year will conduct four training sessions in management techniques for 100 persons who either develop research plans or train those who do.

Federal funding agencies have indicated the failure of many projects is not because of the nature of the problem they propose to study, but rather is because the proposal is too obtuse, or proposes unrealistic time schedules and budgets, Cook said.

Even those that do win federal support frequently require time or cost extensions because of some unplanned for contingency, he added.

With the increasing availability of research funds to support complex, large-scale research and development programs, as represented by the creation of federally supported R & D centers and regional laboratories and the like, the problem of management is going to get worse, Cook said.

Essentially the problem is that the project investigator has lacked sufficient knowledge about management techniques relating to project planning and control.

The current situation could have been predicted, Cook said, because the typical training program in educational research conducted by most universities focuses on developing technical excellence and skills to carry on specific research.

But the educational researcher is being asked not only to prepare a proposal that is technically correct, but also to deal with such new matters as estimates on the work involved, time needed, and finances required, and he must become a manager during the project's operation.

Cook is hoping for a broad representation at the training sessions--people who are department heads, deans and professors of educational research and administration at colleges and universities; directors of research training programs; coordinators of research programs; leaders of the Regional Education Labs; directors and assistants of the Educational Research Information Centers; and those from vocational and technical education centers.

Enrollment in each of the four sessions will be limited to about 25, Cook said. Each participant will receive $75 to help meet expenses. The U. S. Office of Education has provided $35,000 to finance the program.

The first session will be April 22 through 26. Other session dates are June 24 through 28; September 16 through 20; and January 6 through 10, 1969. Further information can be obtained from Cook by writing him at Ohio State, Columbus, Ohio 43210 or by phoning 293-4934.

"MANAGEMENT IMPLEMENTATION IN COLLEGE DEVELOPMENT"

A

LECTURE

by

KATHRYN JANE RIPLEY

RESEARCH ASSISTANT

AT

NORTHERN VIRGINIA COMMUNITY COLLEGE

YOU ARE CORDIALLY INVITED TO ATTEND THIS LECTURE

ON

Wednesday, April 24, 1968
at 7:30 P.M.

IN
THE CANTERBURY ROOM
OF STOUFFER'S UNIVERSITY INN

AN INTEGRAL PART
OF THE
MANAGEMENT TRAINING PROGRAM

THE EDUCATIONAL RESEARCH MANAGEMENT CENTER
COLLEGE OF EDUCATION
OF THE OHIO STATE UNIVERSITY

"MANAGEMENT PROBLEMS IN AN R&D CENTER"

A

PRESENTATION

by

WARREN G. FINDLEY

DIRECTOR

OF THE

RESEARCH & DEVELOPMENT CENTER IN EDUCATIONAL STIMULATION

AT

THE UNIVERSITY OF GEORGIA

YOU ARE CORDIALLY INVITED TO ATTEND THIS LECTURE

ON

WEDNESDAY, JUNE 26, 1968

AT 7:30 P.M.

IN

STOUFFER'S UNIVERSITY INN

AN INTEGRAL PART
OF THE
MANAGEMENT TRAINING PROGRAM

THE EDUCATIONAL PROGRAM MANAGEMENT CENTER
COLLEGE OF EDUCATION
OF THE OHIO STATE UNIVERSITY

YOU ARE CORDIALLY INVITED TO ATTEND A PRESENTATION ON

PPBS IN EDUCATION

BY

DR. HARRY J. HARTLEY

DR. HARTLEY IS WITH THE DEPARTMENT OF EDUCATIONAL ADMINISTRATION AT NEW YORK UNIVERSITY. HE IS THE AUTHOR OF EDUCATIONAL PLANNING-PROGRAM-BUDGETING.

AN INTEGRAL PART OF THE MANAGEMENT TRAINING PROGRAM FOR EDUCATIONAL RESEARCH LEADERS CONDUCTED BY THE EDUCATIONAL PROGRAM MANAGEMENT CENTER OF THE COLLEGE OF EDUCATION.

THE LECTURE WILL BE PRESENTED

AT

STOUFFER'S UNIVERSITY INN

JANUARY 6

7:30 P.M.

Appendix B - Materials Relevant to Participants

1. Participant List by Session
2. Employment Location
3. Educational Background
4. Major Field of Study
5. Geographical Distribution
6. Typical Participant Memorandum

1 - List of Participants by Session

April 22-26, 1968

Dr. Charles P. Bartl
Associate Professor
University of Nevada
Reno, Nevada 89107

Mr. Charles D. Beck, Jr.
Bureau of Educational Research
University of Denver
Denver, Colorado 80210

Miss Ann Marie Bernazza
Research Associate
School of Education
University of Connecticut
U-93 Department of
Educational Psychology
Storrs, Connecticut 06268

Dr. John P. Casey
Assistant Professor of Education
Southern Illinois University
Carbondale, Illinois 62901

Dr. Don W. Chaloupka
Director, Bureau of Research
Colorado State College
Greeley, Colorado 80631

Dr. William H. Clinkenbeard
Director, Title III Planning Grant
Los Angeles County
Superintendent of Schools
155 Washington
Los Angeles, California 90015

Dr. James A. Conway
Associate Professor
Department of Educational Admin.
School of Education
State University of New York
Buffalo, New York 14214

Dr. John F. Curry
Professor of Education
Department of Education
and Psychology
North Texas State University
Denton, Texas 76203

Mr. James Oliver Howell
Research Associate
ERIC Clearinghouse on Rural
Education and Small Schools
Box 3 AP
New Mexico State University
Las Cruces, New Mexico 88001

Dr. Joseph P. McKelpin
Director of Research & Evaluation
College of Education Achievement
Project - 1967
Southern Association of Colleges
and Schools
Suite 592 - 795 Peachtree Street
Atlanta, Georgia 30308

Dr. Jack W. Miller
Associate Director
Institute on School Learning
and Individual Differences
J. F. Kennedy Center
George Peabody College
Nashville, Tennessee 37203

Dr. William A. Miller, Jr.
Associate Professor of Education
and Director of Pupil Appraisal
Center
North Texas State University
Box 5341 University Station
Denton, Texas 76203

List of Participants [illegible] Session

April 22-26, 1968 con't

Dr. David Pankake
Assistant to the Associate Dean
for Research and Development
Indiana University
Tenth and Bypass
Bloomington, Indiana 47401

Dr. Philip K. Piele
Associate Director and
Co-principal Investigator
ERIC Clearinghouse on
Educational Administration
University of Oregon
Hendricks Hall
Eugene, Oregon 97403

Dr. Sally B. Pratt
Research Associate in charge
of Institutional Research
College of Santa Fe
St. Michaels Drive
Santa Fe, New Mexico 87501

Dr. John Ray
Assistant Professor
School of Education
Indiana University
Bloomington, Indiana 47401

Mr. Lester S. Smith
Fiscal Officer
College of Education
The Ohio State University
Columbus, Ohio 43210

Dr. Robert P. Stocking
Supervisor in Education
Massachusetts Department
of Education
Olympia Avenue
Woburn, Massachusetts 01801

Mr. James R. Swanson
Executive Director, Research
261 Knott Building
Florida State Department
of Education
Tallahassee, Florida 32304

Dr. William J. Turner
Consultant - L. A. County
Superintendent of Schools
155 W. Washington Blvd.
Los Angeles, California 90015

Mr. S. F. Wilson
Coordinator of Research Service
Box U-133
University of Connecticut
Storrs, Connecticut 06268

Dr. L. E. Wolfe
Executive Assistant to
the President
Denison University
Granville, Ohio 43023

Mr. Edward F. Wood
Principal Researcher
Center for Research in Vocational
and Technical Education
University of North Dakota
Box 8009 University Station
Grand Forks, North Dakota 58201

Dr. Julius L. Yucker, Jr.
Air Force Institute
of Technology AFIT-0
Wright-Patterson, AFB, Ohio 45433

List of Participants by Session

June 24-28, 1968

Dr. David A. Abramson
Assistant Director - Bureau
of Curriculum Development
New York City Board of Education
131 Livingston Street
Brooklyn, New York 11201

Dr. Oral L. Ballam
Dean, College of Education
Utah State University
Logan, Utah 84321

Dr. William E. Barron, Director
Office of School Surveys
The University of Texas
201 Extension Building
Austin, Texas 78712

Mrs. Betty L. Brockman
Director - Title I & III
Parma City Schools
6726 Ridge Road
Parma, Ohio 44129

Dr. Clarence R. Cole
Regents Professor and Dean
College of Veterinary Medicine
Ohio State University
Columbus, Ohio 43210

Mr. Roger DeCrow
Director - ERIC Clearinghouse
on Adult Education
Syracuse University
Syracuse, New York 13210

Dr. Terry Denny, Director
Office of Research
University of Illinois
270 Education Building
Urbana, Illinois 61801

Mr. Edward P. Dworkin
Research Associate
191 Arps Hall
The Ohio State University
Columbus, Ohio 43210

Dr. Cameron L. Fincher
Associate Director
Institute of Higher Education
The University of Georgia
Athens, Georgia 30601

Mrs. Ijourie S. Fisher
Chairman - Dept. of Psychology
and Education
Miami-Dade Jr. College
11380 N.W. 27 Avenue
Miami, Florida 33147

Dr. Garlie Forehand, Head
Department of Psychology
and Education
Carnegie-Mellon University
Pittsburgh, Pennsylvania 15213

Dr. Ralph A. Forsythe, Director
Bureau of Educational Research
The University of Denver
Denver, Colorado 80210

Sister Caroline M. Gillin
Project Director
Consortium on Research Development
8200 W. Outer Drive
Detroit, Michigan 48219

Mr. Joseph C. Glorioso
Supervisor, Federally
Supported Programs
P. O. Box 2158
Lafayette, Louisiana 70501

List of Participants by Session

June 24-28, 1968 con't

Dr. James E. Hayes, Director
Grants and Special Studies
Central Michigan University
Mt. Pleasant, Michigan 48858

Dr. John L. Hayman, Jr.
Executive Director of
Research and Evaluation
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TABLE B2 - Employment Location of Participant Group

Agency \ Session	April N=17		June N=26		September N=30		January N=22		TOTAL N=95	
	f	%	f	%	f	%	f	%	f	%
State University	9	52.8	9	34.7	18	60.0	16	73.0	52	54.7
Private University	2	11.8	7	27.0	4	13.3	4	18.2	17	17.8
Public School System	2	11.8	3	11.5	1	3.5	1	4.5	7	7.3
Private School System			2	7.7					2	2.1
State Department of Education	2	11.8			4	13.3			6	6.3
Regional Laboratory			1	3.8					1	1.0
ERIC Clearinghouse	2	11.8	1	3.8					3	3.1
Junior College			1	3.8					1	1.0
Other			2	7.7	3	10.0	1	4.5	6	6.3

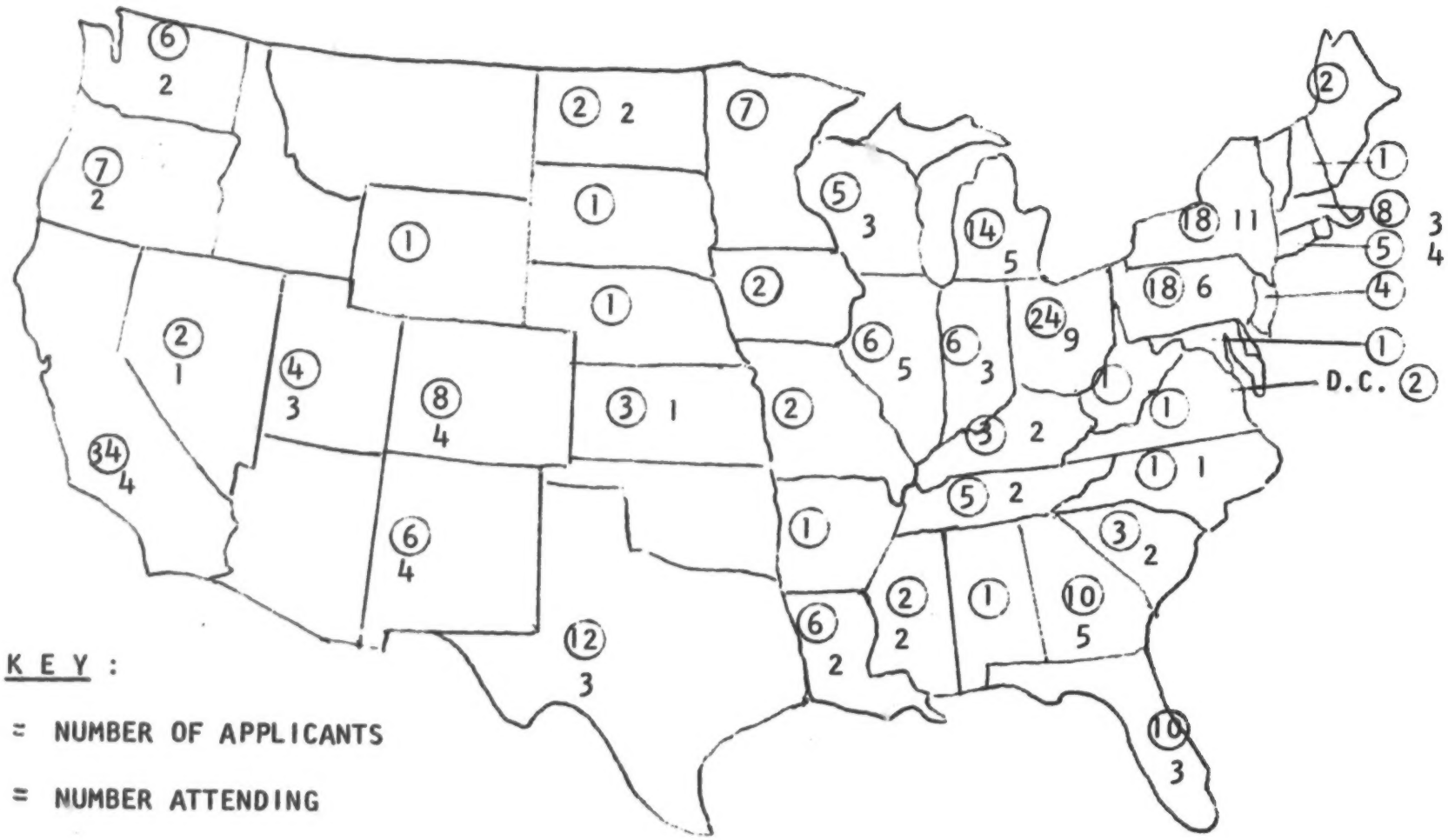
TABLE B3 - Educational Background of Participant Group

Session / Degree	April N=17		June N=26		September N=30		January N=22		TOTAL N=95	
	f	%	f	%	f	%	f	%	f	%
Bachelors	1	5.9	1	3.8	2	6.7	0	0.0	4	4.2
Masters	5	29.3	6	23.0	4	13.4	2	9.1	17	17.8
Doctorates	11	64.8	19	73.2	24	80.0	20	90.9	54	77.8

TABLE B4 - Participant Major Field of Study

Field \ Session	April N=17		June N=26		September N=30		January N=22		TOTAL N=95	
	f	%	f	%	f	%	f	%	f	%
Educational Administration	6	35.4	6	23.2	8	26.6	4	18.2	24	25.3
Education	2	11.8	5	19.2	4	13.4	5	22.7	16	16.8
Educational Research	1	5.9			2	6.7	2	9.1	5	5.2
(Special) Education	2	11.8	3	11.6	3	10.0	2	9.1	10	10.5
Communication	2	11.8					1	4.6	3	3.2
Psychology	2	11.8	7	27.0	10	33.3	6	27.3	25	26.3
Social Science	1	5.9					1	4.6	2	2.1
National Science	1	5.9			1	3.3			2	2.1
Research & Evaluation			4	15.4					4	4.2
Business & Management					2	6.7			2	2.1
Other			1	3.8			1	4.6	2	2.1

FIGURE B5 - GEOGRAPHICAL DISTRIBUTION OF APPLICANTS AND PARTICIPANTS



6. Typical Participant Memorandum

MEMORANDUM

TO: Participants in Management Training Program

FROM: Duane H. Dillman
Assistant Director

SUBJECT: DETAILS AND INFORMATION

DATE: December 13, 1968

1. Advanced Reading Materials In order to derive full benefit from the Program, we encourage you to read Chapters 2 and 4 in Dr. Cook's monograph before arriving for the first session at 9:00 A.M. on Monday morning, January 6, 1969. Although some of these concepts will be discussed during the training program, we hope that you will be familiar with them beforehand. Also enclosed is a paper, "Better Project Planning and Control Through the Use of Systems Analysis and Management Techniques", for your advanced reading.

   Be prepared to read a fairly large number of other papers during the training program!

2. Reimbursement and Stipend You will be reimbursed for round trip tourist air fare from your location to Columbus. Your airline tickets are to be tax exempt because of the nature of the training program. If you drive, you will receive the same reimbursement as if you had flown. We will need receipts from your taxi fare and airline tickets. Your stipend will be $75.00 which should help defray your expenses for room and board.

   Limousine service to Stouffer's does not exist hence you will probably have to take a taxi directly to the Inn. You can take the limousine to downtown Columbus and then a cab to Stouffer's. The cost amounts to about the same either way but it is more direct to go right from the airport.

3. Schedule The schedule for the week is enclosed. For planning purposes in arranging travel schedules, we will close the program at approximately 1 P.M. on Friday. Note that we will have a session on Monday evening. Dr. Harry Hartley of New

6. Typical Participant Memorandum Con't.

York University will make a presentation on the role of the PPBS System in Education. Dr. Hartley has just published a book on this topic and is considered an expert on PPBS.

We normally try to have a "dutch treat" dinner on Thursday evening at one of the local restaurants. We hope each participant will attend but it is not required that they do so.

We look forward to meeting you and ask that you feel free to talk with any of the staff at any time they can be of help in furthering the goals that we have together. If you have any questions, please feel free to call at (area code 614) 293-4934.

Appendix C - Materials Relevant to Evaluation

1. Institute Evaluation Form
2. Management Simulation Evaluation Form
3. Activities-Materials-Personnel Evaluation Form
4. Participant Daily Reaction Form

1. Institute Evaluation Form

Educational Program Management Center
College of Education
The Ohio State University
Columbus, Ohio 43210

INSTITUTE EVALUATION FORM

Session Date _____

Statement	Strongly Agree	Agree	Undecided	Disagree	Strongly Disagree
1. The purposes of the Institute were clear to me	( )	( )	( )	( )	( )
2. The objectives of this Institute were not realistic	( )	( )	( )	( )	( )
3. Specific purposes made it easy to work efficiently	( )	( )	( )	( )	( )
4. The participants accepted the purpose of the Institute	( )	( )	( )	( )	( )
5. The objectives of this program were not the same as my objectives	( )	( )	( )	( )	( )
6. I didn't learn anything new	( )	( )	( )	( )	( )
7. The material presented was valuable to me	( )	( )	( )	( )	( )
8. I could have learned as much by reading a book	( )	( )	( )	( )	( )

	Statements	Strongly Agree	Agree	Undecided	Disagree	Strongly Disagree
9.	Possible solutions to my problems were considered	( )	( )	( )	( )	( )
10.	The information presented was too elementary	( )	( )	( )	( )	( )
11.	The instructors really knew their subject	( )	( )	( )	( )	( )
12.	I was stimulated to think objectively about the topics presented	( )	( )	( )	( )	( )
13.	New acquaintances were made which will help in future research	( )	( )	( )	( )	( )
14.	We worked together as a group	( )	( )	( )	( )	( )
15.	We did not relate theory to practice	( )	( )	( )	( )	( )
16.	The sessions followed a logical order	( )	( )	( )	( )	( )
17.	The schedule was too fixed	( )	( )	( )	( )	( )
18.	There was very little time for informal conversation	( )	( )	( )	( )	( )
19.	I did not have the opportunity to express my ideas	( )	( )	( )	( )	( )
20.	I really felt a part of this group	( )	( )	( )	( )	( )

	Statements	Strongly Agree	Agree	Undecided	Disagree	Strongly Disagree
21.	My time was well spent	( )	( )	( )	( )	( )
22.	The Institute met my expectations	( )	( )	( )	( )	( )
23.	I received no guide for further action	( )	( )	( )	( )	( )
24.	Too much time was devoted to trivial matters	( )	( )	( )	( )	( )
25.	The information presented was too advanced	( )	( )	( )	( )	( )
26.	The content presented was not applicable to the work I do	( )	( )	( )	( )	( )
27.	Institutes of this nature should be offered again in the future	( )	( )	( )	( )	( )
28.	Institutes such as this will contribute little to educational research and development	( )	( )	( )	( )	( )

2. Management Simulation Evaluation Form

Educational Program Management Center
College of Education
The Ohio State University
Columbus, Ohio 43210

MANAGEMENT SIMULATION EVALUATION FORM

Session Date _____

The SWINDLE-SIS management game in which you participated is in the process of being developed as a management instructional device. In order to revise the game, we would like to have your comments and suggestions regarding the several points listed below. Use the reverse side to make any more general comments or suggestions you might have.

1. Administration and organization of the game:

2. Realism of the game:

3. Time length for each session of the game:

4. Information contained in organization description and action memorandums:

5. Correlation with instructional sessions preceding game play:

6. Explication of roles to be played. Is it realistic to attempt to play roles? If not, could anything be substituted to require adaptation to the context of the situation?

7. Feedback from staff regarding your group's actions during sessions or at the end of sessions. Suggestions as to how this could be improved.

8. Clarity of end products to come out of each session:

9. How could the game be improved? (Use reverse side as needed):

10. Other or general comments:

3. Activities-Materials-Personnel Evaluation Form

Educational Program Management Center
College of Education
The Ohio State University
Columbus, Ohio 43210

ACTIVITIES-MATERIALS-PERSONNEL EVALUATION FORM

Session Date _____

Directions: We would like to evaluate the Training Program by providing suggestions and criticisms of our activities. Listed below are some of the activities, materials and personnel with whom you have had contact. Please respond to each of these categories in the space to the right of each topic. Apply a four-point scale of 1-Poor, 2-Fair, 3-Good, 4-Excellent, or NA-Not Applicable. Additionally, list in brief narrative form under each topic the perceived strengths and weaknesses of each presentation and your suggestions for their improvement.

Activities- Materials- Personnel-	Practical Exercises	Clarity of Presentation	Knowledge of Subject	Use of Practical Illustration	Use of Visuals	Organization of Presentation	Overall Presentation
Desmond L. Cook							
Management and Management Systems							
Project Management							
Project Scheduling							
Management Actions							
Project Selection							
Organization and Implementation of Management Systems							

Activities- Materials- Personnel-	Practical Exercises	Clarity of Presentation	Knowledge of Subject	Use of Practical Illustration	Use of Visuals	Organization of Presentation	Overall Presentation
<u>Duane Dillman</u> Project Definition							
<u>Bill Loeber</u> Cost/Budget Preparation Control							
<u>Steve Gyuro</u> Project Planning							

4. Participant Daily Reaction Sheet

Educational Program Management Center
College of Education
The Ohio State University
Columbus, Ohio 43210

PARTICIPANT DAILY REACTION SHEET

Session Date _____

A. Your questions (about content, facilities, etc.)

B. Your comments (on content, presentation, instruction, facilities, etc.)

C. Your suggestions (regarding content, instruction, arrangements, etc.)

(Use other side as necessary)

Appendix D - Materials relevant to Instruction

1. A Listing of Materials in the Participant Notebook

2. A Typical Instructional Schedule

1. A Listing of Materials in the Participant Notebook

A. Lecture Reference Material

1. Kepner-Tregoe Action Sequence (Kepner-Tregoe Ass. Inc.)

   a. Problem Analysis Worksheet
   b. Decision Analysis Worksheet
   c. Potential Problem Analysis Worksheet

2. Workbreakdown structure for Management Training Program

3. Participant Daily Reaction Sheet

4. The Planning, Programming, Budgeting Cycle

5. Project Definition for AERA Presession 1968

6. Sample Activity Card

7. Work package development worksheet and completed example

8. "Some Warning Flags for Project Termination" from Buell, C. K., "When to Terminate a Research and Development Project," Research Management, 10:275-284, July 1967.

9. "Suggested Components of R and D Management Areas (after Yovits) from Spiegel, Joseph and Walker, Donald E., (editors), Proceedings of the Second Congress of the Information System Sciences, Washington, D. C.: Spartan Books, Inc. 1965.

10. "Tentative Job Description of Project Manager in One Company" from Davis, K., A Preliminary Study of Management Patterns of Research Project Managers in Manufacturing in the Phoenix Area, Arizona State University, 1961.

11. "Traditional and Modern Techniques of Decision-Making" from Simon, Herbert A., The New Science of Management Decision, New York: Harper & Row, 1960.

12. "Typical Problems for Further Research Related Directly to R & D Project Selection Decision-Making" from Brandenburg, Richard G., "Project Selection in Industrial R & D: Problems and Decision Processes," Research Program Effectiveness, 1966.

B. Background Papers

1. Anthony, R. M., Planning and Control Systems: A Framework for Analysis, Division of Research, Graduate School of Business Administration, Harvard University, Boston, 1965 (Abstract).

2. Cook, Desmond L., The Use of Systems Analysis and Management Techniques in Program Planning and Evaluation, Presented at the Symposium on the Application of Systems Analysis and Management Techniques to Educational Planning in California. Chapman College, Orange, California, June, 1967.

3. Cook, Desmond L., Better Project Planning and Control Through The Use of System Analysis and Management Techniques, Presented at the Symposium on Operations Analysis of Education, Washington, D. C., November 20-22, 1967.

4. Katzenbach, Edward L., Program Budgeting for Sponsored Research, presented at a Joint Conference sponsored by the American Council on Education and John Hopkins University, 1965.

5. Frederiksen, Norman O., The Administration of an Educational Research Program, Paper presented at the 1966 AERA-PDK Conference on Organizations for Research and Development in Education, 1966.

6. Gideonse, Hendrik D., Developing Five Year Projections for USOE Research, Paper delivered at an AERA Convention, Chicago, Illinois, February, 1968.

7. Kaufman, Roger A. and Corrigan, Robert E., What is the System Approach, and What's In It for Administrators?, Presented at the Symposium on the Application of Systems Analysis and Management Techniques to Education Planning in California, Chapman College, Orange, California, June, 1967.

8. Meals, Donald W., "Heuristic Models for Systems Planning," Phi Delta Kappan, Vol. XLVII, No. 6, January, 1967.

9. Rivlin, Alice, Education Policy and Education Research, Paper presented at AERA Symposium, Chicago, Illinois, February, 1968.

10. "The A, B, C's of PPBS," The Secretary's Letter, Vol. 1, No. 3, Department of Health, Education, and Welfare, Washington, D. C., July, 1967.

C. Bibliographies and References

1. Nature and Functions of Management
2. Management Systems Implementation
3. Management Systems Applications in Education
4. Research Management
5. Program Management
6. Project Selection
7. Project Planning
8. Program Definition
9. Time Estimation
10. Project Scheduling and Resource Allocation
11. Control

2. A Typical Instructional Schedule

Day	Time	Instructor	Topic
Monday	9:00 AM	Director	Welcome Orientation Administration Objectives Procedures
	9:30 AM	Staff	Simulation Exercise - I a. Introduction to Simulation b. Organization for Exercise
	10:45	Director	Management and Management Systems a. Management Functions b. Nature of Management c. Management Process d. Management Systems
	1:30 PM	Staff	Project Definition a. Systems Theory b. System Analysis c. Program Definition d. Workbreakdown Structure
	3:15 PM	Staff	Simulation Exercise - II a. Project Definition b. Workbreakdown Stucture Development
Tuesday	9:00 AM	Staff	Project Planning a. Planning Principles b. Types of Planning c. Flow Graphs d. Network Construction
	10:45 AM	Staff	Simulation Exercise - III a. Continuation of II b. Network Construction
	1:30 PM	Staff	Simulation Exercise - IV a. Continuation of III b. Simulation Analysis and Feedback
	3:15 PM	Director	Project Management

Day	Time	Instructor	Topic
Wednesday	9:00 AM	Director	Project Scheduling a. Time Estimation b. Resource Allocation
	10:45 AM	Staff	Simulation Exercise - V a. Time Estimation b. Schedule Development
	1:30 PM	Director	Cost/Budget Preparation a. Cost Estimation b. Budgeting Procedures
	3:15 PM	Staff	Simulation Exercise - VI a. Resource Determination b. Budget Preparation
	7:30 PM	Guest Speaker	Management Applications in Education
Thursday	9:00 AM	Staff	Control a. Nature of Control b. Control Procedures c. Information Systems d. Report Functions
	10:45 AM	Director	Management Actions a. Problem Analysis b. Decision-Making c. Potential Problems Analysis
	1:30 PM	Staff	Simulation Exercise - VII a. Presentation of Proposals b. Review and Feedback
	3:15 PM	Director	Research Management
Friday	9:00 AM	Director	Project Selection
	10:45 AM	Director	Organization & Implementation of Management Systems
	12:00 AM	Director & Staff	Critique/Summary
	1:00 PM	Director & Staff	Evaluation & Dismissal